

# **Project Documentation and Report**

## **LONG TERM INTERNSHIP ON SALESFORCE**

**Project Title: Implementing CRM for Result Tracking of a candidate with Internal marks**

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# **IMPLEMENTING CRM FOR RESULT TRACKING OF A CANDIDATE WITH INTERNAL MARKS**

## **Introduction :**

### **Overview :**

The improved features of CRM software have increased both its complexity and necessity. Nearly half of CRM implementation campaigns suffer from improper preparation and misaligned objectives among internal stakeholders. A properly conceived CRM implementation strategy covers the breakdown of its goals, research, strategy, development, and future. This article is for small business owners who want to make sure they are taking the right steps when implementing a new CRM system.

### **Purpose :**

The purpose of the project is to manage the school students result tracking process in the easy way. Students do not need to check the notice board and everyone will stay updated. This is the main purpose of this project. We can work easily and increase candidate quality. This project will also help to those professionals who are in cross-technology and wanted to switch to salesforce with the help of this project they will gain knowledge and can include into their resume as well.

## **Literature survey :**

A CRM system can be used to improve the relationship you have with candidates. You can use it to communicate with them effectively, meaning they will be more likely to respond when you send them an email inviting them for an interview or informing them of their status in your recruitment process.

Implementation of CRM in enterprises serves not only to maintain existing customers and acquire new ones but also introduces integration in the company, improves processes and communication between individual departments.

## **Theoretical analysis :**

**Block Diagram : Diagrammatic view of the project :**

**Implementing CRM for result tracking of a candidate with internal marks :**

Create Salesforce Org – a) Creating Developer Org

b) Account Activation



Object – Creation of semester object for candidate internal result card



What is a Tab? – Creation of semester tab for candidate internal result card



Lightning App – Create the candidate for internal result card app



Fields and relationships – a) Creation of text field on lecturer details and look up field for the candidate object.  
b) Creation of auto number field on candidate object, number field on course details object and formula field course details object



Users – Creating a User



User Adoption – a) Create Record (Course details)  
b) View Record (Course details)  
c) Delete Record (Course details)



Reports – a) Create Reports  
b) View Reports



Dashboards – a) Create Dashboards

b) View Dashboards

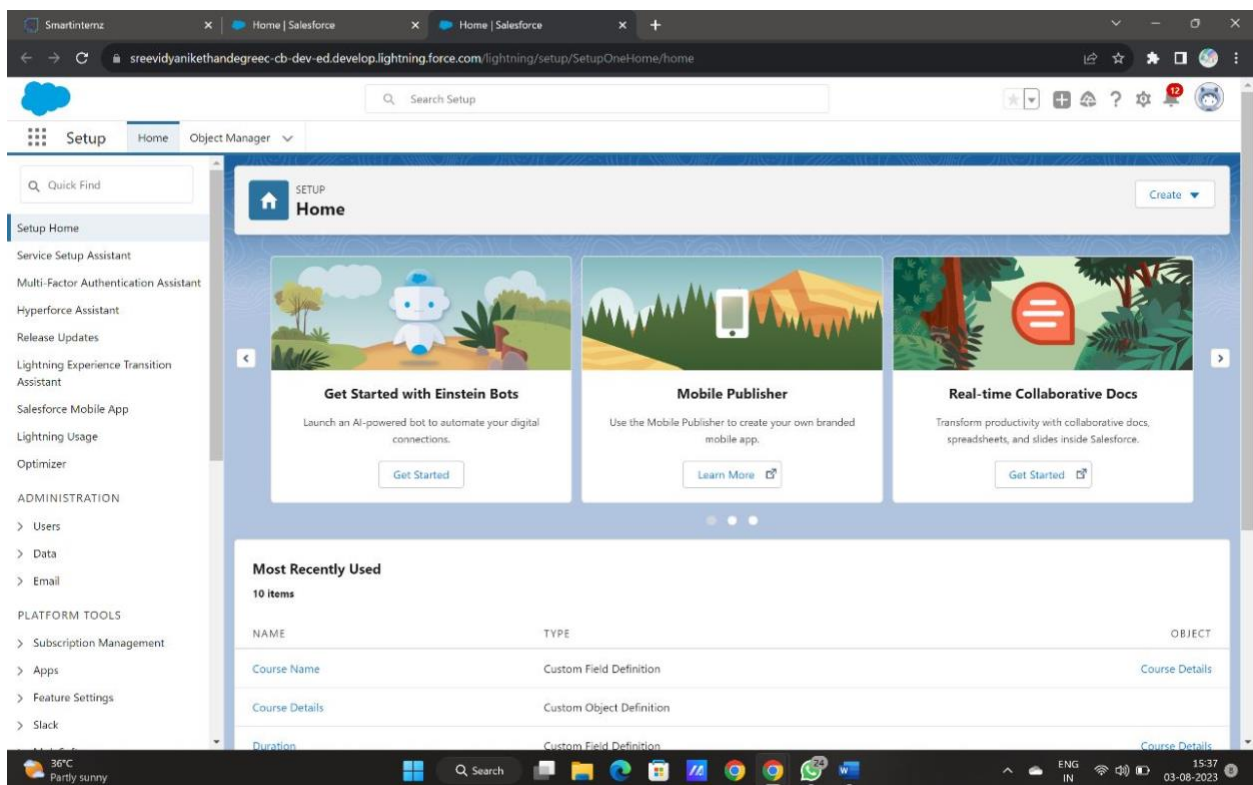
**Create a salesforce org** – We have created a developer org and activated the account.

Salesforce signup link :

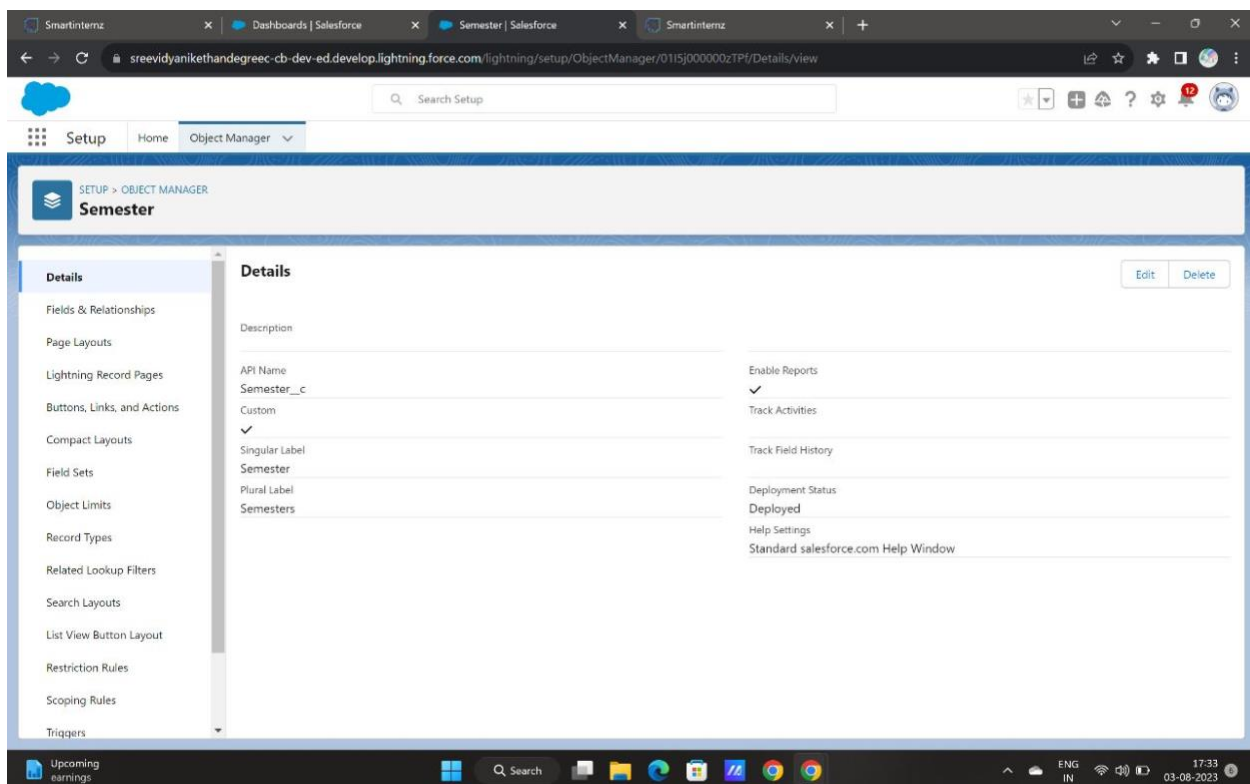
<https://developer.salesforce.com/signup>

Salesforce Login link : <https://login.salesforce.com>

In the below picture we have logged into Salesforce org.



**Object** – We have created semester, candidate, course details, lecturer details, internal results object for candidate internal result card. In the same way we have created 4 more objects such as candidate, course details, lecturer details and internal results.



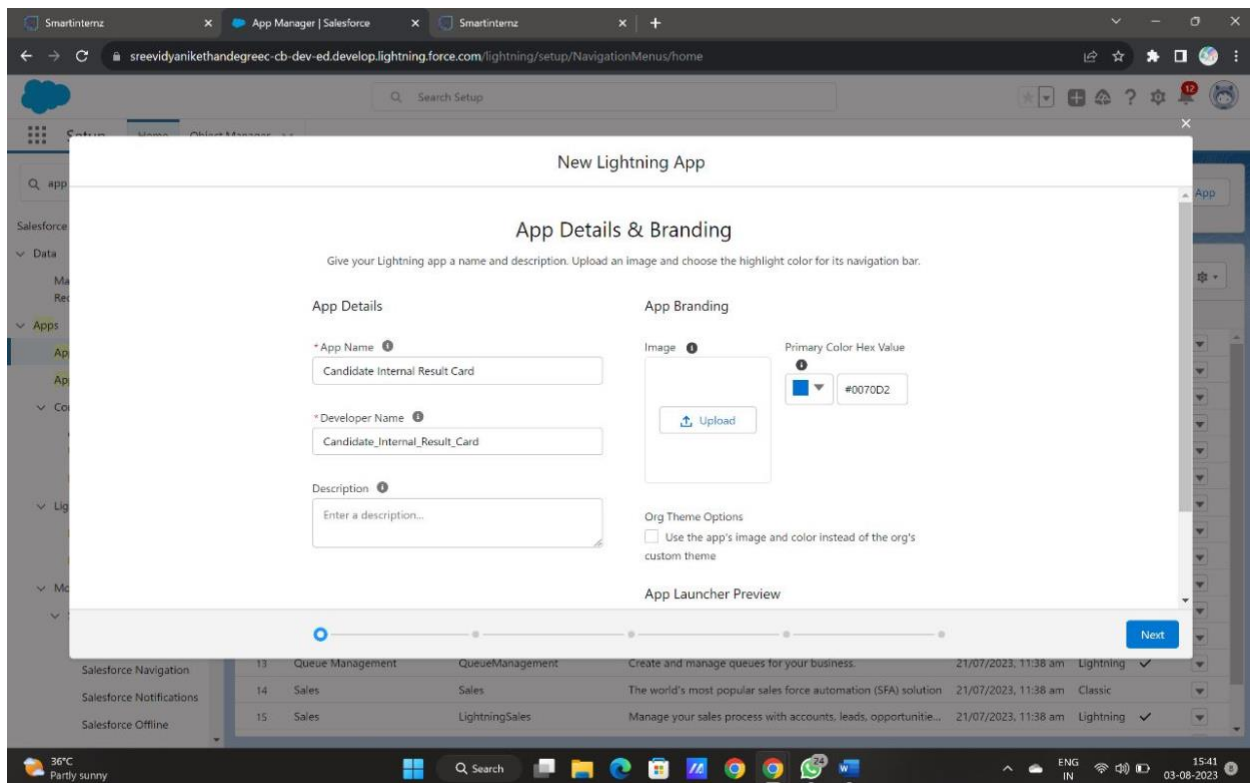
**Tab** – We have created semester, candidate, course details, lecturer details, internal results tabs for candidate internal result card.

The screenshot shows the Salesforce Setup interface for Custom Tabs. The left sidebar contains a search bar with 'tabs' entered and a list of navigation items: 'User Interface', 'Rename Tabs and Labels', and 'Tabs'. The main content area is titled 'Custom Tabs' and includes a 'Help for this Page' link. Below the title, there is a descriptive paragraph about custom tabs. The interface is divided into four sections: 'Custom Object Tabs', 'Web Tabs', 'Visualforce Tabs', and 'Lightning Component Tabs'. Each section has a 'New' button and a 'What Is This?' link. The 'Custom Object Tabs' section contains a table with the following data:

Action	Label	Tab Style	Description
Edit   Del	Candidates	Motorcycle	
Edit   Del	Course Details	Mail	
Edit   Del	Internal results	Microphone	
Edit   Del	Lecturer Details	Musical Note	
Edit   Del	Semesters	Moon	

The 'Web Tabs', 'Visualforce Tabs', and 'Lightning Component Tabs' sections each display the message 'No [Tab Type] Tabs have been defined'.

**Lightning App** – We have created the candidate internal result card app.



**Fields and relationships** – We have created text field on lecturer details and lookup field for the candidate object. And created auto number field on candidate object, number field on course details object and formula field course details object. In the similar way we have created all fields on their respective objects.



SmartInternz x Dashboards | Salesforce x Semester | Salesforce x SmartInternz x +

apsche.smartinternz.com/Student/guided\_project\_info/3681#

Dashboard  
Internship  
Support  
Training Calendar

Guided Project Project Workspace

Implementing CRM For Result Tracking Of A Candidate With Internal Marks - (ADMIN)

- Create Salesforce Org
- Object
- What is A Tab?
- Lightning App
- Fields And Relationship
  - Creation Of Text Field On "Lecturer Details" & Look Up Field For The "Candidate" Object
  - Creation Of Auto Number Field On Candidate Object, Number Field On Course Details Object & Formula Field Course Details Object

created by creating custom relationship fields on an object. This is done so that when users view records, they can also see and access related data.

Object Name	Field Name	Data type
Semester	Semester Name	Text(Standard field)
	Course	Lookup(Course Details)
Candidate	Candidate Name	Text(Standard field)
	Candidate Roll Number	Auto Number
Lecturer Details	Semester Name	Lookup(Semester)
	Lecturer Name	Text(Standard field)
Course Details	Lecturer Role	Text
	Course	Lookup(Course)
	Course Name	Text(Standard field)
Internal results	Duration (Years)	Number
	Candidate	Lookup (candidate)
	Candidate Roll Number	Formula
	Course	Lookup(Course)
	Marks	Number

34°C Partly sunny

SmartInternz x Semester | Salesforce x SmartInternz x +

sreevidyanikethandegree-cb-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/015j000000zTPf/FieldsAndRelationships/view

Setup Home Object Manager

SETUP > OBJECT MANAGER  
Semester

Details  
Fields & Relationships  
Page Layouts  
Lightning Record Pages  
Buttons, Links, and Actions  
Compact Layouts  
Field Sets  
Object Limits  
Record Types  
Related Lookup Filters  
Search Layouts  
List View Button Layout  
Restriction Rules  
Scoping Rules  
Triggers

Fields & Relationships  
5 Items, Sorted by Field Label

Q Quick Find New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Course Details	Course_Details__c	Lookup(Course Details)		✓
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Semester Name	Name	Text(80)		✓

36°C Partly sunny

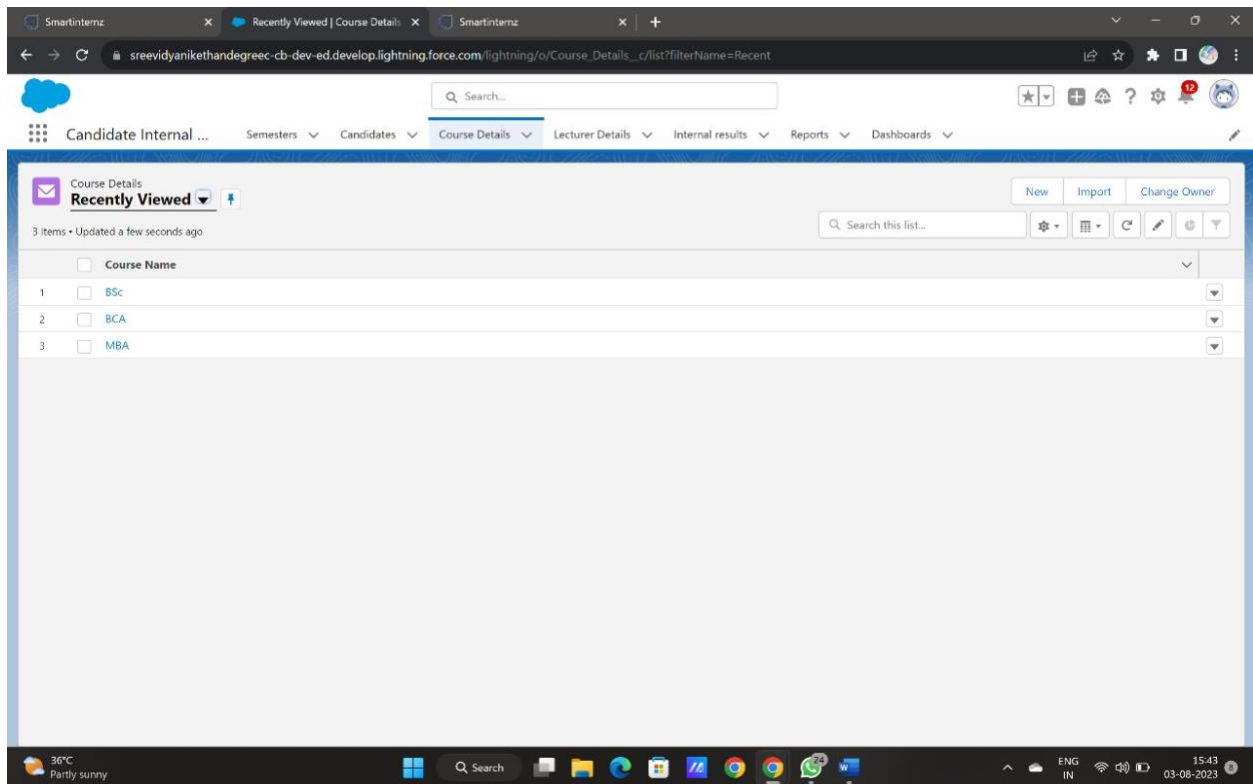
**Users** – We have created a user named as class teacher.

The screenshot shows the Salesforce Setup interface for a user named 'Class Teacher'. The left sidebar contains navigation links for Setup, Home, Object Manager, and a search bar. The main content area displays the user's details and settings.

**User Detail**

Name	Class Teacher	Role
Alias	cleac	User License
Email	meghanareddyseethi@gmail.com [Verified]	Salesforce
Username	meghanareddyseethi@gmail.com	Profile
Nickname	User1689932082226612874	Active
Title		Marketing User
Company		Offline User
Department		Knowledge User
Division		Flow User
Address		Service Cloud User
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Contributor User
Locale	English (India)	Site.com Publisher User
Language	English	WDC User
Delegated Approver		Mobile Push Registrations
Manager		Data.com User Type
Receive Approval Request Emails	Only if I am an approver	Accessibility Mode (Classic Only)
Federation ID		Debug Mode
App Registration: One-Time Password Authenticator		High-Contrast Palette on Charts
		Load Lightning Pages While Scrolling

**User Adoption** – We have created records, viewed records and deleted a particular record in course details.



**Reports** – We have created and viewed report named as candidate internal result report.

The screenshot displays the Salesforce Reports interface. The browser address bar shows the URL: `sreevidyanikethandegrec-cb-dev-ed.develop.lightning.force.com/lightning/o/Report/home?queryScope=mrn`. The Salesforce navigation bar includes a search bar and a menu with options: Candidate Internal ..., Semesters, Candidates, Course Details, Lecturer Details, Internal results, Reports (selected), and Dashboards. The main content area is titled 'Reports' and 'Recent', showing a list of 1 item. The report details are as follows:

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	Candidate Internal Result Report		Private Reports	Seeni Meghana	1/8/2023, 9:02 pm	

The left sidebar contains navigation links for 'Created by Me', 'Private Reports', 'Public Reports', 'All Reports', 'FOLDERS', 'All Folders', 'Created by Me', 'Shared with Me', 'FAVORITES', and 'All Favorites'. The Windows taskbar at the bottom shows the date as 03-08-2023 and the time as 17:19.

**Dashboards** – We have created and viewed dashboard named as candidate internal result card.

The screenshot displays the Salesforce Dashboards interface. The browser address bar shows the URL: `sreevidyanikethandegrec-cb-dev-ed.develop.lightning.force.com/lightning/o/Dashboard/home?queryScope=mr`. The Salesforce navigation bar includes a search bar and a menu with options: Candidate Internal ..., Semesters, Candidates, Course Details, Lecturer Details, Internal results, Reports, and Dashboards. The Dashboards section is active, showing a 'Recent' dashboard list. The list contains one item: 'Candidate Internal Result Card', which is categorized under 'Private Dashboards', created by 'Seeni Meghana', and dated '1/8/2023, 9:04 pm'. The left sidebar provides navigation options for Dashboards (Recent, Created by Me, Private Dashboards, All Dashboards), Folders (All Folders, Created by Me, Shared with Me), and Favorites (All Favorites). The Windows taskbar at the bottom shows the system date as 03-08-2023 and time as 17:19.

DASHBOARDS	Dashboard Name	Description	Folder	Created By	Created On	Subscribed
Recent	Candidate Internal Result Card		Private Dashboards	Seeni Meghana	1/8/2023, 9:04 pm	

## Result :

**Reports** – We have created and viewed report named as candidate internal result report.

The screenshot displays the Salesforce Reports interface. The top navigation bar includes 'Candidate Internal ...', 'Semesters', 'Candidates', 'Course Details', 'Lecturer Details', 'Internal results', 'Reports', and 'Dashboards'. The 'Reports' tab is active, showing a list of recent reports. The 'Candidate Internal Result Report' is highlighted.

Below the navigation bar, the 'Recent' section shows a table with columns: Report Name, Description, Folder, Created By, Created On, and Subscribed. The 'Candidate Internal Result Report' is listed with a description of 'Candidate Internal Result Report', folder 'Private Reports', created by 'Seeni Meghana', and created on '1/8/2023, 9:02 pm'.

The 'Candidate Internal Result Report' is then viewed, showing a summary of 16 records. The table below displays the data:

Course Details: Course Name	Course Details: Duration	3.00	2.00	Total
<input type="checkbox"/> MBA	Record Count	0	4	4
<input type="checkbox"/> BSc	Record Count	6	0	6
<input type="checkbox"/> BCA	Record Count	6	0	6
<b>Total</b>	<b>Record Count</b>	<b>12</b>	<b>4</b>	<b>16</b>

The 'Details (16 Rows)' section shows a list of records with columns: Course Details: Record ID, Duration, and Course Details: Record ID. The records are as follows:

Course Details: Record ID	Duration
1 a025j0000aVAX	Medium Course
2 a025j0000aVAX	Medium Course
3 a025j0000aVAX	Medium Course
4 a025j0000aVAX	Medium Course
5 a025j0000aVAH	Large Course
6 a025j0000aVAH	Large Course
7 a025j0000aVAH	Large Course

The bottom of the screen shows the 'Row Counts' section with 'Detail Rows' checked, 'Grand Total' checked, and 'Stacked Summaries' checked. The status bar at the bottom indicates '36°C Partly sunny' and the time '15:44' on '03-08-2023'.

**Dashboards** – We have created and viewed dashboard named as candidate internal result card.

The screenshot shows the Salesforce Dashboards home page. The browser address bar displays the URL: `sreevidyanikethandgreec-cb-dev-ed.develop.lightning.force.com/lightning/o/Dashboard/home?queryScope=mrui`. The page features a navigation bar with tabs for Semesters, Candidates, Course Details, Lecturer Details, Internal results, Reports, and Dashboards. The Dashboards tab is active, showing a 'Recent' section with a table of dashboards. The table has columns for Dashboard Name, Description, Folder, Created By, Created On, and Subscribed. A single dashboard, 'Candidate Internal Result Card', is listed, created by Seeni Meghana on 1/8/2023 at 9:04 pm. The left sidebar contains navigation links for Dashboards, Folders, and Favorites.

DASHBOARDS	Dashboard Name	Description	Folder	Created By	Created On	Subscribed
Recent	Candidate Internal Result Card		Private Dashboards	Seeni Meghana	1/8/2023, 9:04 pm	

The screenshot shows the 'Candidate Internal Result Card' dashboard. The browser address bar displays the URL: `sreevidyanikethandgreec-cb-dev-ed.develop.lightning.force.com/lightning/r/Dashboard/01Z5j000000Z1h1EAC/view?queryScope=userFolders`. The dashboard title is 'Candidate Internal Result Card', and it is dated 'As of 03-Aug-2023, 3:44 pm Viewing as Seeni Meghana'. The dashboard contains a bar chart titled 'Candidate Internal Result Report' showing the record count for three courses: BCA, BSc, and MBA. The y-axis is labeled 'Record Count' and ranges from 0 to 6. The x-axis is labeled 'Course Details: Course Name' and lists the courses. The legend indicates that the blue bars represent 'Course Details: Duration' with values of 3.00 and 2.00. The record counts are: BCA (6), BSc (6), and MBA (4).

Course Details: Course Name	Record Count
BCA	6
BSc	6
MBA	4

## **Advantages and Disadvantages :**

### **Advantages :**

- It allows for the consolidation of customer data and the basis for deep insights.
- It speeds up the sales conversion process.
- It increases staff productivity, lowering time-cost.
- It allows geographically dispersed teams to collaborate effectively.
- Improves Customer experience by allowing personalization and improved query resolution.

### **Disadvantages :**

- Customer experience may worsen due to staff over-reliance on the system.
- Security and data protection issues with centralized data.
- The excess initial time and productivity cost at the implementation.
- Requires a process-driven sales organization.
- CRM may not suit all businesses.

### **Applications :**

- Target marketing
- Increase candidate quality
- Can work easily



- Streamlining internal sales processes

### **Conclusion :**

Student internal mark management system deals with student details, academic related reports, college details and course details. It tracks all the details of a student from the day one to the end of his/her course which can be used for all reporting purpose, tracking of progress in the course, completed semester, upcoming semester details, exam details, project or any other assignment details, and final exam result.

### **Future scope :**

Scope of education means range of view, outlook, field or opportunity of activity, operation and application of education. Education has a wider meaning and application.

